

CHECKLIST TO DESIGNATE AREAS OF EVALUATION FOR REQUESTS FOR PROPOSAL (RFP)

MDOT PROJECT MANAGER Calvin Roberts, P.E.			JOB NUMBER (JN) N/A	CONTROL SECTION (CS) N/A
DESCRIPTION IF NO JN/CS Project Management Services for the Office of Research and National Best Practices				
MDOT PROJECT MANAGER: Check all items to be included in RFP. WHITE = REQUIRED GRAY SHADING = OPTIONAL			CONSULTANT: Provide only checked items below in proposal.	
Check the appropriate Tier in the box below				
<input type="checkbox"/> TIER I (\$25,000-\$99,999)	<input checked="" type="checkbox"/> TIER II (\$100,000-\$250,000)	<input type="checkbox"/> TIER III (>\$250,000)		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Understanding of Service	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>Innovations</i>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>Safety Program</i>	
N/A	<input type="checkbox"/>	<input type="checkbox"/>	Organization Chart	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Qualifications of Team	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Past Performance	
Not required as part of official RFP	Not required as part of official RFP	<input type="checkbox"/>	Quality Assurance/Quality Control	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Location. The percentage of work performed in Michigan will be used on all contracts unless the contract is for on-site inspection, then location should be scored for the on-site inspection.	
N/A	N/A	<input type="checkbox"/>	Presentation	
N/A	N/A	<input type="checkbox"/>	Technical Proposal (if Presentation is required)	
3 pages (MDOT forms not counted) (No Resumes)	7 pages (MDOT forms not counted)	19 pages (MDOT forms not counted)	Total maximum pages for RFP not including key personnel resumes	

REQUEST FOR PROPOSAL

The Michigan Department of Transportation (MDOT) is seeking professional services for the project contained in the attached scope of services.

If your firm is interested in providing services, please indicate your interest by submitting a Proposal, Proposal/Bid Sheet or Bid Sheet as indicated below. The documents must be submitted in accordance with the latest "Consultant/Vendor Selection Guidelines for Service Contracts" and "Guideline for Completing a Low Bid Sheet(s)", if a low bid is involved as part of the selection process. **Referenced Guidelines are available on MDOT's website under Doing Business > Requests for Proposals.**

RFP SPECIFIC INFORMATION

☒ BUREAU OF HIGHWAYS ☐ BUREAU OF TRANSPORTATION PLANNING ** ☐ OTHER

THE SERVICE WAS POSTED ON THE ANTICIPATED QUARTERLY REQUESTS FOR PROPOSALS

☒ NO ☐ YES DATED _____ THROUGH _____

<input type="checkbox"/> Prequalified Services – See page ____ of the attached Scope of Services for required Prequalification Classifications.	<input checked="" type="checkbox"/> Non-Prequalified Services - If selected, the vendor must make sure that current financial information, including labor rates, overhead computations, and financial statements, if overhead is not audited, is on file with MDOT's Office of Commission Audits. This information must be on file for the prime vendor and all sub vendors so that the contract will not be delayed.
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☒ **Qualifications Based Selection** – Use Consultant/Vendor Selection Guidelines

For all Qualifications Based Selections, the selection team will review the information submitted and will select the firm considered most qualified to perform the services based on the proposals. The selected vendor will be contacted to confirm capacity. Upon confirmation, that firm will be asked to prepare a priced proposal. Negotiations will be conducted with the firm selected.

**** For RFP's that originate in Bureau of Transportation Planning only**, a price proposal must be submitted at the same time as, but separate from, the proposal. Submit directly to the Contract Administrator/Selection Specialist, Bureau of Transportation Planning (**see address list, page 2**). The price proposal must be submitted in a sealed manila envelope, clearly marked in large red letters **"PRICE PROPOSAL – TO BE OPENED ONLY BY SELECTION SPECIALIST."** The vendor's name and return address **MUST** be on the front of the envelope. The price proposal will only be opened for the highest scoring proposal. Unopened price proposals will be returned to the unselected vendor(s). Failure to comply with this procedure may result in your bid being opened erroneously by the mail room.

For a cost plus fixed fee contract, the selected vendor must have a cost accounting system to support a cost plus fixed fee contract. This type of system has a job-order cost accounting system for the recording and accumulation of costs incurred under its contracts. Each project is assigned a job number so that costs may be segregated and accumulated in the vendor's job-order accounting system.

☐ **Qualifications Review / Low Bid** - Use Consultant/Vendor Selection Guidelines. See Bid Sheet Instructions for additional information.

For Qualification Review/Low Bid selections, the selection team will review the proposals submitted and post the date of the bid opening on the MDOT website. The notification will be posted at least two business days prior to the bid opening. Only bids from vendors that meet proposal requirements will be opened. The vendor with the lowest bid will be selected. The selected vendor may be contacted to confirm capacity.

☐ **Best Value** - Use Consultant/Vendor Selection Guidelines. See Bid Sheet Instructions below for additional information. The bid amount is a component of the total proposal score, not the determining factor of the selection.

☐ **Low Bid** (no qualifications review required - no proposal required.) See Bid Sheet Instructions below for additional instructions.

BID SHEET INSTRUCTIONS

A bid sheet(s) must be submitted in accordance with the "Guideline for Completing a Low Bid Sheet(s)" (available on MDOT's website). The Bid Sheet is located at the end of the Scope of Services. Submit bid sheet(s) separate from the proposal, to the address indicated below. The bid sheet(s) must be submitted in a sealed manila envelope, clearly marked in large red letters **"SEALED BID – TO BE OPENED ONLY BY SELECTION SPECIALIST."** The vendor's name and return address **MUST** be on the front of the envelope. Failure to comply with this procedure may result in your bid being opened erroneously by the mail room.

PROPOSAL SUBMITTAL INFORMATION

REQUIRED NUMBER OF COPIES FOR PROJECT MANAGER 4	PROPOSAL DUE DATE 3/22/07	TIME DUE 3 p.m.
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PROPOSAL AND BID SHEET MAILING ADDRESSES

Mail the multiple proposal bundle to the MDOT Project Manager or Other indicated below.

☒ MDOT Project Manager ☐ MDOT Other

Calvin Roberts, P.E., ORNBP
Michigan Department of Transportation
PO Box 30050
Lansing, MI 48909

Mail one additional stapled copy of the proposal to the Lansing Office indicated below.

Lansing Regular Mail	OR	Lansing Overnight Mail
<input checked="" type="checkbox"/> Secretary, Contract Services Div - B225 Michigan Department of Transportation PO Box 30050 Lansing, MI 48909		Secretary, Contract Services Div - B225 Michigan Department of Transportation 425 W. Ottawa Lansing, MI 48933
<input type="checkbox"/> Contract Administrator/Selection Specialist Bureau of Transportation Planning B340 Michigan Department of Transportation PO Box 30050 Lansing, MI 48909		Contract Administrator/Selection Specialist Bureau of Transportation Planning B340 Michigan Department of Transportation 425 W. Ottawa Lansing, MI 48933

GENERAL INFORMATION

Any questions relative to the scope of services must be submitted by e-mail to the MDOT Project Manager. Questions must be received by the Project Manager at least four (4) working days prior to the due date and time specified above. All questions and answers will be placed on the MDOT website as soon as possible after receipt of the questions, and at least three (3) days prior to the RFP due date deadline. The names of vendors submitting questions will not be disclosed.

MDOT is an equal opportunity employer and MDOT DBE firms are encouraged to apply. The participating DBE firm, as currently certified by MDOT's Office of Equal Opportunity, shall be listed in the Proposal

MDOT FORMS REQUIRED AS PART OF PROPOSAL SUBMISSION

- 5100D – Request for Proposal Cover Sheet
- 5100G – Certification of Availability of Key Personnel

(These forms are not included in the proposal maximum page count.)

Michigan Department of Transportation

SCOPE OF SERVICE FOR EXECUTIVE SERVICES

PROJECT MANAGEMENT SERVICES

LOCATION: Statewide

WORK DESCRIPTION: Marketing, technical writing, and project management services to Michigan Department of Transportation's (MDOT's) Office of Research and National Best Practices (ORNBP). The consultant will develop various types of print and electronic media, conduct a peer exchange, create and perform surveys, and develop a strategic plan, an annual report, and a research program for 2008.

MDOT PROJECT MANAGER:

Calvin Roberts, P.E.
425 West Ottawa, Lansing, Michigan 48933
PH: 517-241-4667
FAX: 517-335-2785
E-MAIL: robertsc@michigan.gov

GENERAL INFORMATION: Familiarity and connections with personnel from the Federal Highway Administration, American Association of State Highway and Transportation Officials, Transportation Research Boards, National Cooperative Highway Research Program, and various state transportation research agencies is a must, for the consultants will be establishing the Peer Exchange team. The Peer Exchange is a federal requirement of all state agencies receiving State Planning and Research funds. Every three to five years each state department of transportation invites transportation research officials and engineers from federal and other state agencies as well as universities to review, critique, and offer suggestions to the research program based on their expertise and experience.

Extensive knowledge and experience with transportation and business processes associated with transportation research is required. ORNBP is responsible for communicating MDOT's research processes and findings to internal and external stakeholders and peers. Some of our customers include, but are not limited to, Federal Highway Administration engineers and staff, MDOT and other state transportation department's engineers and staff, university personnel, and the public. Our communications are highly technical in nature and must maintain accuracy and integrity while still being understood by the general public. The consultant will be assisting ORNBP establish its Web site that must also meet the above criteria.

CONSULTANT RESPONSIBILITIES: Consultant will assist ORNBP with the federally-required peer exchange, develop communications, revise MDOT's Research Administration Manual, develop ORNBP's strategic plan, revise the annual reporting process, and refine MDOT's Call for Projects process as part of the preparation for the peer review. These areas will require expertise in the areas of consulting, technical and non-technical writing, project management, research, editing, publication and Web design, graphics, and administrative support.

A. Peer Exchange:

1. Assist in development of peer exchange theme(s), identification of visiting team members and Michigan participants (MDOT and external), and formation of planning team.
2. Lead regular meetings of planning team to develop a detailed agenda, objectives, presenter names, documentation format and report-out to upper management.
3. Develop a detailed communication plan for promoting to upper management and MDOT customers the value of the exchange and its intended outcomes.
4. Arrange facilities and meals, and travel and accommodations for visiting team members.
5. Serve as facilitators during the peer exchange, leading discussions, documenting observations, preparing final report.
6. Develop a detailed communication plan for leveraging the results of the peer exchange and final report to achieve ORNBP's near-term and mid-term objectives.

B. Develop Communications:

1. Design communications tools to raise awareness and appreciation of ORNBP activities and plans. Tools could include surveys of customers, regular e-newsletters for MDOT employees, an e-newsletter for external partners, print newsletters, PowerPoint presentations, videos, Web conferences, program fact sheets, and other vehicles. Tools will be designed in a coordinated fashion to establish a strong identity and brand for ORNBP.
2. Develop communications tools to bring new knowledge into MDOT from regional and national sources such as TRB, NCHRP and the other cooperative research programs, AASHTO and pooled fund efforts, especially those in which MDOT participates. Tools could include synthesis reports, e-newsletters, and monthly wrap-ups of best practices in targeted topic areas (planning, environment, operations, safety, maintenance, transit, rail and harbors as well as construction and materials).
3. Write the content for selected communication tools using appropriate formats, images, charts and graphs for maximum impact. Use results of surveys and interviews of ORNBP staff, MDOT management, investigators and users to gain credibility and provide tailored content.
4. Facilitate regular publication and distribution of communication products.
5. Deliver presentations at MDOT meetings and conferences.

C. Research Administrative Manual:

1. Review the draft manual, make needed edits and identify how it can be used during the peer exchange.
2. Recommend potential uses of the manual with MDOT staff and partners.

D. Develop ORNBP Strategic Plan:

1. Review ORNBP mission, organizational goals, funding, past and current activities, and pertinent information from the Michigan Transportation Research Board. Identify ways to coordinate the ORNBP strategic plan with MDOT's overall department strategic plan.
2. Identify pertinent NCHRP reports and information from AASHTO and its Research Advisory Committee related to planning and execution of state DOT research programs.
3. Lead a strategic planning process with ORNBP staff and others as appropriate to develop the outlines of a strategic plan for the Office that looks at one-year, three-year and five-year goals.
4. Draft the strategic plan for a cycle of ORNBP reviews, making revisions as the document progresses. Develop appropriate formats for print and online presentation of the plan.
5. Develop outreach activities for using the strategic plan to raise the visibility of ORNBP in MDOT and with partners.

E. Develop Annual Report:

1. Develop appropriate scope and approach for ORNBP "program level" annual report that can accompany or include existing project level information. Consider advisability of including project information for only one calendar or fiscal year at a time, archiving previous years' information.
2. Design print and online report format aimed at raising the visibility of ORNBP and providing easy access to pertinent program and project information.
3. Write the content for the annual report using appropriate formats, images, charts and graphs for maximum impact.
4. Facilitate publication and distribution.

F. Develop 2008 Research Program:

1. Assist in development of overall research program, including materials/construction projects, policy research, pooled fund participation, and national meetings and conferences.
2. Assist with research solicitation activities.

G: Provide timely assistance for:

1. Problems, concerns, etc. that may arise.
2. Modifications to meet any MDOT approved schedule revisions proposed by the Consultant.
3. Documentation to incorporate any unforeseen conditions that arise.
4. Verification of substitutions or changes by the Consultant.

The consultant and any sub-consultants contracted by the Michigan Department of Transportation (MDOT) must possess a valid license issued by the NRC, or recognized Agreement State.

Failure of any of the above will be found in noncompliance with the contract.

DELIVERABLES:

A. Peer Exchange

1. Develop theme(s), identify team
2. Lead planning meetings
3. Develop pre-exchange communications plan
4. Arrange facilities, accommodations
5. Serve as facilitators
6. Develop post-exchange communications plan

B. Communications

1. Design tools to raise awareness of ORNBP
2. Design tools to bring MDOT new knowledge
3. Write content
4. Facilitate publication and distribution
5. Deliver presentations at MDOT

C. Research Administration Manual

1. Review draft manual
2. Recommend revisions and uses
3. Assist in preparing online version

D. ORNBP Strategic Plan

1. Coordinate with MDOT plan
2. Identify national best practices
3. Lead strategic planning process
4. Draft, revise, and finalize strategic plan
5. Develop outreach activities

E. Annual Report

1. Develop scope and approach
2. Design print and online report formats
3. Write, revise, and finalize content
4. Facilitate publication and distribution

F. 2008 Research Program

1. Assist in development of program
2. Assist with solicitation activities

MDOT RESPONSIBILITIES:

- A. Provide copies of materials for the consultant to familiarize themselves with MDOT's research operations, personnel, customers, and objectives.
- B. Schedule and/or conduct project meetings and phone conferences as necessary.
- C. Assist in establishing detailed task outlines, timelines for completion, and milestones for checking progress.

- D. Maintain frequent communications providing guidance, reviews, and approvals as necessary.
- E. Monitor progress of tasks and budget throughout the contract.

COORDINATION PROCEDURES

- A. The MDOT Project Engineer will review any issues. If necessary, the MDOT project engineer will contact the Consultant.
- B. The Consultant will advise the MDOT Project Engineer in writing of any costs associated with the assistance and a completion date of the work. The written response shall state the work to be completed, the name of the requester of the work, the completion date of the work, and the estimate of hours and related cost to complete the work.
- C. Responses to project issues from the Consultant shall be in writing to the MDOT Project Engineer.

CONSULTANT PAYMENT

All invoices/bills for services must be directed to the Department and follow the 'then current' guidelines. The latest copy of the "Professional Engineering Service Reimbursement Guidelines for Bureau of Highways" is available on MDOT's Bulletin Board System. This document contains instructions and forms that must be followed and used for invoicing/billing; payment may be delayed or decreased if the instructions are not followed.

Payment to the Consultant for Services rendered shall not exceed the "Cost Plus Fixed Fee Not to Exceed Maximum Amount" unless an increase is approved in accordance with the contract with the Consultant. All invoices/bills must be submitted within 14 calendar days of the last date of services being performed for that invoice.

Supporting documentation must be submitted, with the invoice/bill, for all billable expenses on the Project. The only hours that will be considered allowable charges for this contract are those that are directly attributable to the activities of this Project. Hours spent in administrative, clerical, or accounting roles for billing and support, are not considered allowable hours; there will be no reimbursement for these hours.

Reimbursement for overtime hours will be limited to time spent on this project in excess of forty hours per week. Any variations to this rule should be included in the priced proposal submitted by the Consultant and must have prior approval by the MDOT Project Engineer Manager.

The hours billed for the inspector will not begin until the inspector reports to the project site, or the project office. Direct expenses will not be paid in the excess of that allowed by the Department for its own employees.

The fixed fee allowed for this project is 11.0%.